



Matt Stanley

CENTER CITY Digest

Recovery: Are We There Yet?

Is this the new normal? In November 2022, pedestrian volumes in Center City from Vine Street to South Street, river to river, based on anonymized Placer.AI cellphone data, put tourists, visitors to cultural institutions, convention attendees and those who come to shop, dine and access services at 73% of November 2019 levels. With more people living here than three years ago, residents registered at 126%. Workers logged in at 55% of 2019 volumes. The average of all three suggests a 73.5% recovery rate.

CCD also deploys sidewalks sensors at 11 locations within the dense commercial core: 8th to 19th Street, John F. Kennedy Boulevard to Walnut Street. These show a recovery rate of just over 80%. Three pairs of sensors, positioned in the office district (1700 block of JFK Boulevard, 1800 block of Market Street and 1600 block of Market) recorded volumes up 115% from January 2022, peaking on Tuesdays, Wednesdays and Thursdays.¹

Talk with major employers and some speculate, often with resignation, that things may have reached a plateau. They offer anecdotes about wandering through empty offices on Mondays and Fridays. Brokers

report many lease renewals taking 20% to 30% less space. Formal vacancy counts are up from 12% in 2019 to 18.4% in Q3 2022, even as life sciences expand and small new firms move in.

As good as it gets?

Technology now enables viable alternatives to convene staff from diverse locations, eliminating travel time and the need to dress for success. Quick to draw conclusions, some journalists proclaim the office is dead, while speculating that a new algorithm will digitally simulate serendipity at the water cooler.

No doubt, there are repetitive and routine functions that can be performed from anywhere, as in call centers where everyone sticks to the script. Zoom, Webex and Teams are far less effective in picking up unspoken cues of body language or replicating random conversations in the corridor or on sidewalks that free you from the digital box, disrupt routine and spark new ideas. Most agree that offices remain the best setting for collaboration, innovation and mentoring; but how frequently? How much office space do we need downtown?

A surging cottage industry of research on work from home and return to office comes with its own abbreviations (WFH) and (RTO). The most quoted is a Stanford University team conducting national and international surveys. Their findings from October 2022, *across all industries*, provide a helpful corrective to one-off news stories. Only 13.6% of full-time, wage and salaried employees, they conclude, are completely remote; 57% are on site; 29.4% occupy the middle ground of *hybrid*.² Some professions that tend to cluster in downtowns more easily lend themselves to remote: information technology employees average 2.5 days per week WFH; finance and insurance, 2.18 days; professional and business services, 1.99 days. Employees on site at least four days per week are in manufacturing, retail, hospitality and food services, transportation, warehousing and personal services — suggesting a bifurcation in work experience by sector and educational level.

An Economic Innovation Group study finds patterns of remote work across the United States are far from uniform, shaped by two major variables: the structure of local industry and the length of pre-pandemic commutes.³ The greater the

¹ These November counts represent a distinct increase over October volumes as reported in Center City Pedestrian Vitality, <https://centercityphila.org/research-reports/center-city-pedestrian-counts-report-november-2022>

² Work from Home Research, <https://wfhresearch.com/>. The October report shows a modest, but distinct increase in RTO from their summer report.



local concentration of occupations that lend themselves to remote work — primarily tech and some financial services — the higher the WFH quotient. Amazon occupies 20% of office space in downtown Seattle; tech firms consume 38% of San Francisco’s downtown office space. Comcast occupies just under 6% of Center City’s inventory. Contrary to type, they are a high visibility leader in promoting RTO.

The more time workers spent commuting in 2019, the more motivation to stay home in 2022. Whatever our complaints about the Schuylkill Expressway and I-95, auto commutes here were far shorter than places like Los Angeles and Washington, D.C. In a national survey, Philadelphia was far down the list in 19th position with 23% WFH. A large downtown residential population and good regional transit infrastructure surely helps.

An August 2022 Gallup survey of what employees want speaks of an *endowment effect* created by WFH. Mandates in 2020 and 2021 inadvertently extended a perk to employees that employers now struggle to withdraw. Americans, raised in a culture of individual as king, don’t easily give back what they’ve acquired: the convenience of dressing only from the waist up or saving on clothing altogether. There were also substantial benefits and challenges, like juggling work with child care.

On the other hand, a KPMG report in October 2022 that focused on *employer perspectives* suggests as economic conditions grow uncertain, half of CEOs are considering

workforce reductions — with remote workers likely the first to go. One journalist offered this takeaway: “A caveat for people who like working from home: remote workers may find it in their best interest to show their faces in the office as their job security becomes more uncertain.” Whether this reflects impending workplace realities or employers just venting frustrations about the purported *great resignation*, it’s the focal point for tension, redefinition and negotiation between employers and employees.

More is in Our Control Than We Think.

If there is a *great resignation* out there, it may best describe the passivity and fatalism of those who feel powerless against trends beyond their control. To be sure, the pandemic had profound consequences beyond impacts on health and economic vitality. It shook confidence that we are masters of our fate. Initially, we feared crowds and density, distrusted strangers and didn’t even know what we could touch. Suddenly the bubonic plague, yellow fever and influenza epidemics jumped from history books onto the front page, the evening news and social media feeds.

But consider how quickly the disease was diagnosed, vaccines tested and widely distributed. The bubonic plague of 14th century is estimated to have killed 50% of Europe’s population. The yellow fever killed 10% of residents in this city in 1793. In 1918-19, 16,000 people, 1% of population, died from the Spanish flu in Philadelphia. Currently, our death rate from Covid is just 0.33%. A terrible price, unevenly distributed, but helpful to view in historical context.

Just because we don’t control everything, doesn’t mean we’re powerless to master anything. The studies above suggest that conditions vary dramatically by place and that shaping a response based on local conditions is essential. In business, as in politics, leadership matters. CEOs who issued disembodied edicts by email got predictable reactions, as did those who simply gave up. Leaders who engaged staff in discussions of corporate mission and RTO planning, addressed substantive employee needs, showed some flexibility and adapted the office to be more worker friendly, tended to get employees back in larger numbers. No surprise, smaller and medium sized firms often had greater success than large, multi-locational businesses.

Two recent studies from the Brookings Institution highlight what’s at stake. A September 2022 international survey concluded WFH gained popularity because it offers greater flexibility in time management, expands personal freedom and saves on time and the costs of commuting and grooming.⁴ Yet, this view is far from universal. Some dislike remote work and miss daily interactions with coworkers. Over time, Brookings researchers suggest, those who seek a more collaborative work experience may gravitate to organizations that more closely offer pre-pandemic working arrangements. More significantly, Brookings underscores how younger workers lose out on valuable mentoring, networking and on-the-job learning.

The implications for cities, they caution, are more worrisome. WFH has already reduced the tax base in dense urban areas, though this is currently masked by American Rescue Plan funds. On the hopeful front, the authors see a motivation for local governments to recalibrate an attractive mix of taxes and public services. Cities that respond with efficient management and sound policies will benefit since the deck has been reshuffled nationally in the competition for talent and firms. But poorly governed cities, places not rebuilding and rethinking interconnected approaches to public safety, social services and economic development, run the risk of a downward spiral in tax revenues, urban amenities, workers and residents.

Two-Handed Approach to Public Safety: For CCD, 2020-2022 has been about *back to basics*, back to our reason for forming in 1990. In the spring of 2020, I told staff that it was like 1990 all over again, before realizing that a third of them weren’t even born then.

We increased cleaning and graffiti removal teams to more than 110 staff. We doubled the size of our public safety teams, adding to our 40 uniformed, unarmed Community Services Representatives (CSRs) who work in partnership with police, a new 40-person public safety bike patrol, compensating for the shortage of Philadelphia police, who are simultaneously returning to the principals of community policing, working in partnership with residents and businesses. Our staff helped organize a public safety collaborative with 20 local and federal agencies and with the security forces of major private employers and building managers.

Since 2018, CCD has also partnered CSRs with homeless outreach workers from Project Home, with mental health professionals and with crisis-intervention-trained Philadelphia police officers in a *two handed-approach*. So far this year, they have helped 161 people leave the street, transported by our staff to service and shelter with no arrests or citations. This model establishes police and social workers as partners, not adversaries. SEPTA is doing something similar on their system, partnering police with drug and alcohol outreach teams.

Compare the first nine months of 2022 to the first nine months of 2019: the number of homeless individuals on sidewalks within the CCD is down 24%. It may not seem this way since panhandling and homelessness may be more visible with fewer people on the street, but the progress is real.

So far this year Part 1 (serious crimes) in CCD are 8.7% below 2019 levels. It may not feel that way because headlines are focused on other stories and other major challenges like retail theft and a citywide epidemic

of gun violence that remains appallingly high. But these too are problems within our control — amenable to a *two-handed approach* that brings law enforcement together with social services and job opportunities. In the case of gun violence, this must be augmented with community leaders, local clergy and those with special peer credibility: the mothers of young men who were killed and men returning from prison. Other cities have success with this approach, termed *focused deterrence*, and expanded efforts are underway here that can live beyond the transition from mayor to mayor.⁵

This does not mean we ignore or excuse crime. We need to simultaneously establish consequences for committing crime with alternatives to incarceration, while also providing counseling, drug treatment, resources and job opportunities to reduce the conditions that generate crime.

The Consequences of Inaction:

After 30 years of rebuilding, there were more than 311,000 jobs in Center City in 2019 — 63% of those jobs required less than college degree and 33% required only a high school diploma. The economy of Center City provided opportunity not only for highly-educated, high-wage workers, but also 200,000 jobs for those without college degrees at the convention center and in hotels, health care institutions, retail establishments and in maintenance and security roles in office buildings and on college campuses — opportunities for neighborhood residents who relied on SEPTA to get here.

Technology may enable those who can work remotely to choose to do so, but that erodes the foundation for inclusive growth and

disrupts the economic ecosystem downtown. When higher-wage earners stay home, the demand drops downtown for service jobs, for retail jobs, for building maintenance jobs, for janitorial jobs and security jobs. In an interconnected ecosystem, the decisions we make impact others and can reduce municipal tax revenues that support services and schools. Tending to public safety and quality of life challenges is thus essential to full recovery and economic inclusion.

A second Brookings study suggests this is much larger than an employer/employee negotiation or a challenge to local government. In a national review of job clusters in 100 U.S. metros, they find a clear and positive relationship between the density of jobs and economic productivity, measured by gross metropolitan product (GMP) per worker. The benefits of face-to-face collaboration within firms, networking and teaching things that are hard to explain on Zoom or by email, are further enhanced by the physical proximity of workers employed by different, even competitive firms. The density, diversity and interaction — the unexpected conversations on sidewalks and in cafes — afforded by vibrant, walkable, live-work downtowns pays dividends to employers with an increased volume, quality and originality of output by their employees. The more we come together, the more productive we are. This simultaneously creates more opportunities for workers to choose between firms. Vibrant downtowns and campuses remain the incubators for innovation and creation of new firms.

The last three years were profoundly disruptive as people have reconsidered where they live and work, while firms rethink the role and purpose of the office.. From this comes new opportunities, a reshuffling the deck nationally in the competition for talent and firms.

To stay competitive, it’s best to proceed on two tracks simultaneously: maximizing return to office, fostering and attracting new firms to fill vacant space, while also rethinking the amenities and land-use in the office district, building on our twenty years of success fashioning a diverse, inclusive, live-work downtown.

Paul R. Levy
President
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⁵ Civic Coalition to Save Lives, www.savephillylives.org

³ The Uneven Geography of Remote Work, Economic Innovation Center, September 20, 2022, https://eig.org/the-uneven-geography-of-remote-work/
⁴ Brookings, “Working From Home Around the World,” https://www.brookings.edu/wp-content/uploads/2022/09/Aksoy-et-al-Conference-Draft-BPEA-FA22.pdf

CCD People

Karl Tyler Promoted to Lead Role in CCD Cleaning Division

Long-time Center City District team member Karl Tyler has been promoted to the Director of Operations role for CCD's cleaning operations.

Karl was a member of CCD's original class of Community Service Representatives (CSRs) back in 1991 and worked for three years in the CSR program before joining our contracted cleaning operations in 1994, starting as a team supervisor. For the last decade, he has been managing all sidewalk cleaning crews. With the retirement of long-term operations manager Henry Hippert, Karl stepped into this role in May 2022.

If you see Karl in Center City, be sure to congratulate him on his 31-year commitment to the downtown and for his new leadership role at CCD.



Want to help enhance the vitality of Center City? Join our team. Find job openings at centercityphila.org/jobs

Streetscape Improvements

New In-Street Planters Improve Appearance and Safety

CCD recently completed the installation of in-street planters at 15th Street and JFK Boulevard. The new bike infrastructure and landscaping was created to enhance the appearance the office district and make one of the downtown's high-traffic corridors more bicycle- and pedestrian-friendly, without affecting visibility for vehicles. The planters and greenery will be maintained by CCD. The project was implemented with the cooperation of PennDOT and the City of Philadelphia and the support of neighboring building owners, many of whom have funded sidewalk planters.



Seasonal Favorites Return to CCD Parks

The Wintergarden at Dilworth Park

The popular Wintergarden on the Greenfield Lawn is back for its seventh holiday season at Dilworth Park. This verdant space in the heart of the city is free and open to the public from winter through spring. It features more than 100 varieties of native and pollinator plants, trees, and grasses, along with a festive arbor, animal topiaries and plenty of places to sit and enjoy the atmosphere after an ice skating session.

The Log Tunnel at Sister Cities Park

For the third year, a 150-year-old fallen silver maple tree has found a playful new purpose at Sister Cities Park. The tunnel log was an instant favorite with kids when we introduced it in fall 2020 after smoothing and sealing the interior for safety. We've added a colorful new play mat this year, making this limited-time amenity even more fun for children to explore.



Thank You For Your Support

As pedestrian volumes on Center City sidewalks approach pre-pandemic levels and as more workers have returned to downtown offices, Center City streets are once again animated with people — residents, workers, visitors, and shoppers. Generous contributions to the Center City District Foundation over the past year have supported the recovery of downtown Philadelphia.

CCDF supported the creation of the Wintergarden in Dilworth Park and has underwritten Arts on Center Stage and Parkway Pals, presenting more than 80 free performances and programs in our parks in partnership with Philadelphia’s arts and cultural organizations. Contributions to CCDF also support the Deck the Hall Light Show, highlighting Philadelphia’s historic City Hall throughout the holiday season and making skating in Dilworth Park a unique experience.

Additionally, the Foundation has enabled us to expand our Ambassadors of Hope homeless outreach program, a partnership with Project HOME and the Philadelphia Police Department, as well as deploy our new bicycle safety patrol teams.

A gift to the Center City District Foundation is a gift to all Philadelphians. Please use the enclosed envelope to make an impact today or give online at supportccdf.org

We have continued to plant more trees throughout the downtown and have installed more than 80 new planters with changing seasonal decorations, to support retail and office district recovery by making our public spaces more attractive.

These accomplishments would not have been possible without our corporate partners and contributors, whose generosity fosters the resurgence of Center City, and whose investments continue to animate our parks and streets. Sponsors and donors listed on the next page represent 2022 gifts made through October.

To learn how you can contribute, visit supportccdf.org.

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Welcome to Winter at Dilworth Park

ONGOING

Deck the Hall Light Show
presented by Independence Blue Cross
 Through January 1
 Daily, 5 p.m. – 9 p.m.

Made in Philadelphia Holiday Market
 Through January 1
 Sunday – Thursday, 11 a.m. – 7 p.m.
 Fridays & Saturdays, 11 a.m. – 8 p.m.

Cocktails and Cold Ones
 Through February 22
 Wednesdays, 5 p.m. – 7 p.m.

College Nights
presented by Temple University
 Through February 23
 Thursdays, 5:30 p.m. – 9 p.m.

Rothman Orthopaedics Ice Rink & Rothman Orthopaedics Cabin
 Through February 26
 Daily, visit dilworthpark.org for hours

Wintergarden on the Greenfield Lawn
 Through March 26
 Daily, 9 a.m. – 9 p.m.

COMING IN 2023

Lunar New Year Celebration
presented by Temple University
 January 21
 Saturday, 5 p.m. – 7 p.m.

Free in February
presented by Rothman Orthopaedics
 February 6 – 21
 Mondays and Tuesdays

Superhero Skate
 February 4
 Saturday, 1:30 p.m. – 3 p.m.

Ice Festival
 February 18
 Saturday, 1 p.m. – 7 p.m.



Host your next event at a CCD park!

For info about CCD park rentals, email rentals@centercityphila.org

More Ways to Stay in the Loop

News

CCD: Keeping Downtown Philadelphia Clean, Safe and Attractive

Published October 18, 2022

The mission of the Center City District (CCD) is to provide a clean, safe, well-managed downtown so Philadelphia can successfully compete as an attractive location for business, education and health care institutions, life sciences and for tourism, arts and entertainment, dining and shopping and as the fastest growing residential area in the city. The CCD was established in 1995 to provide security, cleaning and promotional services that supplement, but do not replace, the basic services provided by the City of Philadelphia and the responsibilities of property owners.

To learn more, watch the video above and visit the [CCD Service page](#).

We've added new ways to learn about Center City and the CCD.

We recently created a brief video to summarize CCD's mission and operations, from clean and safe to parks, events and marketing. Check out the video on the Center City District home page: centercityphila.org

Center City District's first-ever blog launched this spring and continues to grow. Our latest posts include holiday itineraries for five downtown commercial corridors, with ideas for shopping, dining and entertainment. Whether you're looking for things to do with the kids, or places to meet friends for cocktails, we've got you covered. Find all of the details at centercityphila.org/blog

- Jewelers' Row: "Silver Listings," Dazzling Gems, Theater, Dining & More**
- Market East: Food Halls, Malls & Deck the Halls!**
- West Market Parkway District: Lounges, Lights, and LOVE in the Air!**
- Celebrate National Vegetarian Month in Center City**
Our top picks for vegan, vegetarian and plant-based friendly eateries!
- CCD Expands Public Safety, Outreach & Crime Prevention Program**
We're supporting Center City's recovery with more sidewalk ambassadors, bike patrols and homeless outreach teams.
- A Wardrobe Fit for Fall**
After more than two years of the work-from-home Zoom uniform of sweatpants and slippers, it's time to enjoy the fun and creativity of dressing up again this fall.

Stay connected to CCD on social media

- @centercitydistrict
- @centercitydistrict
- @ccdphila
- Center City District
- Center City District



CHECK US OUT AT
CCDPARKS.ORG

Center City’s the place to be for holiday shopping, dining and entertainment

This Is How We Holiday

Be on the lookout for our new ad campaign highlighting the unique shopping, food and drink, and unique attractions in five Center City retail corridors: Midtown Village, Market East, Jewelers’ Row, Rittenhouse Row and the West Market/ Parkway District.

Whether you’re sharing holiday traditions with the family, or enjoying some holiday cheer with friends, Center City offers a walkable, vibrant atmosphere accented by outdoor cafes, public spaces and seasonal décor. And with CCD’s daily cleaning, safety and outreach services, visitors can feel comfortable exploring all of the holiday experiences Center City has to offer.

Create an ideal day downtown by checking out our blogs with sample itineraries and suggested stops in five selected business corridors.

centercityphila.org/blog



Dinner and a Show

Dinner and a Show is a new CCD promotion that offers discounted tickets to select performances in some of the city’s most beloved arts and culture venues along the Avenue of the Arts. The initiative kicked off this fall in conjunction with Center City District Restaurant Week and continues through the end of the year.

Participating venues for Dinner and a Show include the Kimmel Cultural Campus, The Philadelphia Orchestra, Philadelphia Ballet, and the Philly Pops. Visit our website for details on shows, dates and venues offering discounts during the holiday season.

centercityphila.org/dinner-show



The Latest Reports from CCD/CPDC

Center City District researches, produces and distributes in-depth reports year-round about the office, retail and residential sectors. The reports assist commercial brokers, property owners, developers, the City of Philadelphia, economic development agencies and our Central Philadelphia Development Corporation (CPDC) membership to attract businesses from outside the region, encourage new startups, retain businesses within Center City and expand the residential population.

Center City Philadelphia Developments 2022

An in-depth report on current and upcoming major real estate projects in Center City. The report includes a map and full-color photos or renderings and project descriptions for all 65 major developments in Center City Philadelphia, categorized by type. Accompanying the report is an interactive map featuring all of the developments found within the publication.

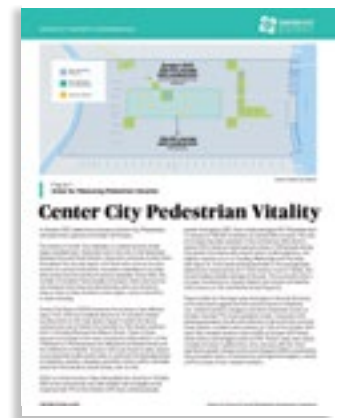
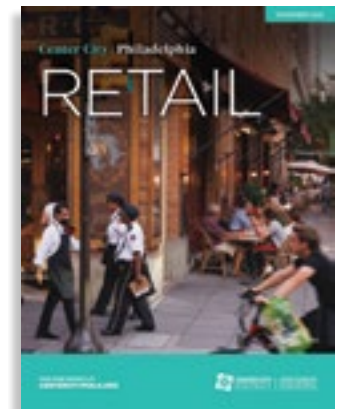
Center City Philadelphia Retail 2022

Center City retailers, restaurants, and commercial property owners have responded to a series of challenges in the last three years with creativity and resilience. The return of conventions, tourism, the reopening of all cultural institutions, the attraction of shoppers from across the city and region and the continuing growth of Philadelphia’s downtown residential population have combined to drive two consecutive years of positive net openings of restaurants and retailers within the district. Office workers have been gradually returning, at just over 50% of pre-pandemic levels in October, with hybrid work patterns somewhat limiting their recurring purchases downtown for the time being. Center City is on course to achieve its pre-pandemic 89% occupancy rate as re-openings and new arrivals have increased occupancy to 80.5% with retail brokers reporting continued tenant inquiries, tours, and active lease negotiations.

Center City Pedestrian Vitality, November 2022

Pedestrian volumes in Center City at the end of October 2022 reached 77% of the October 2019 level, according to data from Center City District sensors measuring pedestrian volumes at 11 locations within the dense commercial core of Center City — from 8th Street to 19th Street, and from JFK Boulevard to Walnut Street.

[Read and download CCD reports at centercityphila.org/research-reports](http://centercityphila.org/research-reports)



Become a CPDC Member Today

Business leaders who are members of the Central Philadelphia Development Corporation (CPDC) have access to year-round programs and events from panel discussions to behind-the-scenes hard hat tours of some of Center City’s most exciting projects.

CPDC membership pays for research and member engagement, and enables CPDC to continue to provide reliable marketplace information and enhance the competitiveness of Center City.

To learn more about CPDC and how to join, visit centercityphila.org/cpdc or contact CPDC Executive Director Prema Gupta at pgupta@centercityphila.org

CENTER CITY Digest



CENTER CITY
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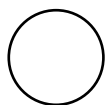
CENTRAL PHILADELPHIA
DEVELOPMENT
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WINTER 2022

Center City Digest is a publication of the Center City District (CCD), a private-sector-sponsored municipal authority committed to providing supplemental services that make Philadelphia's downtown clean, safe and attractive; and of Central Philadelphia Development Corporation (CPDC), with more than 60 years of private-sector commitment to the revitalization of downtown Philadelphia.

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SAVE THE DATE

Restaurant Week *January 15-28, 2023*

DATE

Give the gift of Restaurant Week with gift cards from Center City restaurants.

CCDRestaurantWeek.com